



final report

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No Bull – growing people does grow business

Final Evaluation of the Midfield Personal Directions Pilot Program

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Executive summary

The *Personal Directions* program was a joint initiative of Meat & Livestock Australia (MLA), the Australian Meat Processors Corporation (AMPC) and Midfield Meats, and was part of the *Innovation to Ideas* Program. Developed by OnTrack Dynamics, it was designed as a Pilot program to test the potential to influence absenteeism and retention rates in the meat processing industry by improving the communication skills of both supervisors and employees. Trialled at Midfield's Warrnambool site between March 2003 and May 2004, the program involved thirty four supervisors and managers in *Leaders' workshops* and thirty employees in *Employee workshops*, each held over a weekend. The success of this initiative led the company to commission a second set of workshops involving the original participants in more advanced skills training. However, for a number of reasons, Stage 2 was not completed.

A formal evaluation of the program was conducted by Kate Perkins of Kulu Pty Ltd. She became involved prior to the first workshops and monitored impacts until twelve months after the final workshop.

This report has been prepared at the request of Ms Kerri Abba, Project Leader, OH&S MLA, and is the final in a series produced over the life of the project. It focuses on the outcomes of the Pilot at company level, and identifies key learnings and implications for future directions, if the MLA and AMPC wish to make a similar program available more widely across the industry.

The program

The original *Personal Directions Program* was a generic program developed by OnTrack Dynamics prior to the Midfield pilot. It was supported by extensive manuals, visual aids and rules for the facilitator. She had not been involved in initial discussions with company management or preparation of materials.

In the first workshop, it quickly became clear that the original approach was unlikely to achieve the company's goals or meet individual participants' needs, and it was significantly reworked. A key initiative was the move from a course delivery mode to a participant centered mode. The facilitator involved participants in identifying the interpersonal skills they believed to be most important in their workplace, and then drew on her personal repertoire of models, techniques and relevant information to tailor each workshop within a defined scope. All participants cited the fact that they had 'designed' their workshop as one of the major reasons for its interest and usefulness. This methodology, and the skill of the facilitator in managing the process, certainly helped in overcoming the initial resistance of supervisors, who arrived feeling resentful about having to come to a weekend program, without pay, on a topic they perceived to be of little use to them.

In the three months following the first series of workshops, interviews and third party observations provided convincing evidence that the program had been influential in bringing about short term behaviour changes. Most participants reported that they had implemented at least one new technique - and that they were getting such good results that they wanted to keep going. Most of these new behaviours were maintained over the following 12 months.

The workshops' effectiveness rested on several critical factors:

Relevance.

The program targeted issues that all participants – not just management- believed to be important, because participants had genuine influence over workshop content.

More than skills training.

The workshops placed interpersonal skills firmly within the company context, combining insights into the operations of the company with practical tools and techniques, discussion of workplace issues and real- life problem solving.

Interconnectedness.

The workshops were deliberately designed to promote cross-company interaction and understanding, bringing together people who did not normally have the opportunity to mix at work.

A challenge to expectations about 'training'

The off-site workshops did not look or feel 'like school' or resemble the meat skills training sessions with which participants were familiar. Although they stretched and challenged participants, they were informal, non-threatening and fun. They recognised and valued participants' knowledge and skills.

A clear link between the workshop and the workplace

The workshop focused explicitly on ways of applying what had been learnt in the context of each person's job or home life.

An expert facilitator with high level training skills and change management experience.

The *direct involvement of senior managers*, both as participants and as presenters talking informally about their roles in the company, their career paths and company future directions.

Regular reflection

The regular interviews with the evaluator also helped to reinforce new behaviours. These sessions created a space for participants to reflect on what they had been doing and why, and the process of trying to explain their thoughts and actions to someone else seemed to provide insights and act as a motivator to continue.

Influence on organisational change

There was also evidence that the program brought about change at the organisational level.

Participants reported that the company 'Big Picture' provided information they had not heard before, made them excited about the company's prospects (and their own), and helped them to appreciate where they fitted into the scheme of things.

The very act of bringing people together from different parts of the site - as part of a focused and well structured program rather than purely as a social occasion - also had enormous impact. Participants gained insights into the problems experienced in other parts of the plant, and began to appreciate the role that their own areas often played in creating headaches for other sections. Back in the workplace, this led some supervisors to organise visits to other parts of the plant, and began a new practice where supervisors took the trouble to contact other areas to give them forewarning of possible production problems, slow downs etc. This represented a major shift in attitude and behaviour in a company where everyone was used to taking responsibility only for their own productivity levels and bonuses.

There were also reports from all levels – senior managers, supervisors and employees - of a noticeable change in the general 'tone' across the site. People were reported to be calmer, fewer disagreements were escalating into major conflict, and consequently, fewer people were being sent to senior management for disciplining. Interviewees attributed this to a noticeable change in the approach adopted by some supervisors, and the active involvement of other program participants in keeping the peace.

Impact on absenteeism and retention

Absenteeism and retention were key target areas of the program. While there were many indicators of a positive impact on absenteeism, the effect on retention was less clear cut.

Absentee levels dropped markedly in the 12 months after Stage 1. The emergence of 'Adopt a person' as a formalised approach to absenteeism captured participants' imaginations and gave them a way of managing a problem most had previously believed to be beyond their control.¹ Workshop discussions also led to a rethinking and recasting of supervisor roles and responsibilities. A significant shift was the recognition that supervisors should take greater direct responsibility for managing worker absenteeism, where previously this had been a senior management role.

Initially, the workshops also appeared to have been extremely effective in encouraging promising young people to stay with the company. Participants were enthusiastic about the opportunity they had been given and valued it highly. They felt committed to the company and were excited about the possible career pathways it could offer through its diverse business. On an individual level, the workshop was instrumental in helping several 'troubled' employees to get their lives back on track to such an extent that two were later promoted.

However, any retention program is a two edged sword. There were indications that the program may have instilled several employees and supervisors with the confidence and skills to take the plunge and leave the company for higher paid positions elsewhere! But perhaps of greater concern was the fact that the program raised participant expectations but did not follow through. Although several participants were promoted, those who had been interested in moving sideways to learn new skills and knowledge got no response from the company at all. Over time, this proved to be counter-productive, with some of the most promising and enthusiastic employees becoming cynical. After 12 months, several were on the brink of leaving, citing lack of management interest in providing new opportunities as the major reason.

Although both supervisors and employee participants reported that they would feel more valued if they could provide ideas and input into work area issues, management was not prepared to consider making any changes to the existing consultation processes, despite consistent feedback that employees did not feel comfortable to comment in these forums.

Beyond the workshops

Lack of follow-up on a range of fronts was the major failing of the Pilot program. One of the problems was that it was originally conceived as a training program that would, of itself, drive long term change. However, although it could get things started, other strategies were needed to build on these foundations. This did not happen. While key company managers may have appreciated the need to maintain the momentum generated by the workshops, they did not have the time to rethink their approach to young people and career paths, nor the personnel to manage the process. Investing scarce resources in the development of employees was not a priority in the fast-paced, hands-on environment of a factory where the focus was always on processing today's meat. It was an even greater challenge, because it might have meant a short term loss of productivity on the floor, if reliable, high performing workers were moved to new areas to learn new skills.

Maintaining the momentum was further complicated by a five-month delay in the approval of funding for Stage 2 workshops (which had not been envisaged or budgeted for as part of original plans). Although it was largely a reflection of the slow nature of the MLA approvals process, on-site, employees interpreted this as a lack of management commitment to the program. When the Stage 2 workshops finally began, a serious disagreement between supervisors and the Chief

¹ Unfortunately, despite repeated efforts, it was not possible to substantiate the impact quantitatively as company data was not kept in a form that made it possible to easily compare performance over time, and the company did not have anyone who could be released to focus on this work.

Executive had just occurred. There had also been a change of facilitator precipitated by OnTrack. The new person had no context within which to appreciate or manage the fall-out that occurred during the workshop. Her written report caused Senior management some alarm and anger and led to their request to stop the program before completion of Stage 2.

Conclusions

On the basis of the findings over a 12 month period, there is clearly a role for a program such as this within the industry, particularly in companies that have had little exposure to formal organisational and individual development programs.

The fact that most participants were able to maintain at least one new behaviour over a 12 month period is evidence of the effectiveness of the workshop design and content. The informal follow-up inherent in the evaluation process also provided on-going support for those individual participants who contributed to the evaluation process, and should be seen as an integral part of the program.

However, a series of 'one-off' workshops should not be expected to have impact for an indefinite period. Without on-going input of some sort, people usually revert to previous, well established habits. It is not surprising that the high level of initial enthusiasm waned and that some employees' excitement gradually turned to disillusionment as they, and others, forgot some of the workshop's messages. It is not surprising that many participants became cynical over time. The company had invited selected employees to participate because of their potential as future leaders, but then sent them back to their old jobs as if nothing had ever happened.

The workshop process worked so well because it was more than a generic skills program, and attempted to help participants consider interpersonal skills within the context of their workplace. However, by its very nature, it built staff expectations.

Once employees are encouraged by management to think more broadly about the company and about their roles within it, or asked to play a role in maintaining a convivial workplace, expectations will be raised. People are likely to get enthusiastic and their commitment to the company increases. To capitalise on this, there must be follow-up. Although company management gave the approach their full support in principle, they had not thought through the implications in practice, and were not in a position to build on the foundation of skills and enthusiasm established during the workshops.

While the original generic skills program would have been seen as a fairly basic training package in many industries, it represented a genuine innovation in the meat industry, where there has not been a history of focusing on people skills or 'people based' strategies to address issue such as absenteeism. Interestingly, the contextualised program that evolved during the Pilot would be considered innovative in a number of industries. But is the meat industry ready to embrace an approach that would be challenging for industries with more highly sophisticated approaches to people management and development? Responses to the Pilot video and various presentations made about the program at state and national conferences would suggest that many in the industry are ready to try new ways of attracting, developing and keeping their workforces.

The Pilot provides a blueprint for the training aspects of future programs, while demonstrating the importance of managing the whole process as a change program - with a training component designed to meet a company's specified goals. If the program is to be made more widely available, companies need to recognise that they are not buying a 'one-size fits all' training program that will fix all their people problems. They must be prepared make a long term commitment and to invest time in developing strategies that will help to embed the new learning in their organizations.

Future directions

It was originally intended that the Pilot would lead to the development of a standardised training program that could be taught by anyone, anywhere. There is no need for a new 'off the shelf' interpersonal skills training program when there are so many already available. As discussed, the success of Stage 1 came from the way it was tailored to the company's goals, and to the interests and perceived needs of each group of participants. The failure of Stage 2 came partly from a reversion to the 'off the shelf approach' combined with a lack of change management expertise available to the company at a critical time.

The future effectiveness of the program in other companies will depend on the quality of those who facilitate it within a company. Besides being highly skilled trainers, program facilitators need skills in designing tailored programs that will achieve the company's goals, and in assisting companies to design structures and systems that will reinforce new behaviours.

Thus, future development of a program should focus on ways of making a pool of experienced change managers/facilitators available to companies wishing to implement their own programs.

However, this does not mean that each workshop series must be developed from scratch. On the contrary, the Pilot has provided a set of core concepts, models and activities that are likely to be applicable across different contexts - so long as the facilitator has the breadth and depth of knowledge and skill to modify on the run. The core materials developed during the Pilot would provide a substantial base for the training component of a future program.

If supported appropriately, this approach could be effectively incorporated into an industry push to address retention issues. It could also be a vehicle for the achievement of other results, such as a reduction in absenteeism, ethnic tension, and conflict or stress levels.

Recommendations

MLA should not consider making available a standardised training program based on the original Personal Directions program. However, it should explore the potential to establish a mechanism to facilitate uptake of tailored versions of the program based on the approach developed during Stage 1 of the pilot. This could be called *Managing Up, Down and Across*.

The major element of an industry wide mechanism would be a small pool of highly experienced change managers who could work with individual companies while collaborating to bring about industry wide change in perceptions and practices.

A core set of support materials could be developed based on the revised workshop process and content. Further materials to be developed would provide templates to help a company establish the support structures and strategies to leverage change beyond the workshops themselves.

Ways of linking the program into the broader retention strategy should be considered, with a particular focus on using the process as a means of benchmarking and monitoring change in this area across the industry.

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1 Introduction

1.1 Background

The *Personal Directions* program was a joint initiative between Meat & Livestock Australia (MLA), the Australian Meat Processors Corporation (AMPC) and Midfield Meats, as part of the Innovation to Ideas program. Developed by OnTrack Dynamics, the program was designed to impact on absenteeism and retention rates in the meat processing industry by improving the communication skills of both supervisors and employees and thus influencing workplace climate. It was trialled at Midfield's Warrnambool site between March 2003 and May 2004, with a formal evaluation conducted over this period by Kate Perkins of Kulu Pty Ltd.

The Pilot was originally intended as the first of a series in different companies. However, MLA has since begun development of a broad strategy to address retention issues within the industry, and is interested in exploring the potential of a program such as this within this context.

This report has been prepared at the request of Kerri Abba, Project Leader, OH&S, MLA, and is the final in a series produced over the life of the project. It focuses on the key outcomes of the Pilot, and implications for future directions if the MLA and AMPC wish to make a similar program available more widely across the industry.

1.2 Aims

This report aims to:

- summarise the outcomes of the *Personal Directions* pilot.
- identify learning of relevance to the industry as a whole.
- explore issues pertaining to the application of the program within a broader range of strategies to address retention issues.

1.3 Scope

As two previous reports have provided detailed documentation and interim results of the program since its inception, this report will focus mainly on that information most relevant to planning for future directions. However, as it may be read as a stand-alone document by people who have not been closely involved in the program in the past, a brief history and information on key features of the program are provided.

One of the original aims of the evaluation was to develop ways of measuring impact on absenteeism and retention. However, the quantitative data required to do this was not available from the company. Therefore, the major findings are based largely on detailed qualitative data.

1.4 Report structure

Section 1 introduces the report, its aims and scope.

Section 2 provides a brief history of the *Personal Directions* program.

Section 3 provides a summary of evidence on how well the program met its original goals.

Section 4 identifies key factors influencing its effectiveness, critical issues and learning that may influence the direction of future programs.

Section 5 outlines conclusions and recommendations for possible future directions.

1.5 Acknowledgements

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2 The program

2.1 History

2.1.1 Overview

The *Personal Directions Program* was designed to make a difference to absenteeism and retention rates in the meat processing industry by improving the communication skills of both supervisors and employees. It was based on the hypothesis that increasing the skills and self-awareness of key groups within a meat company would improve communication and reduce conflict and associated stresses. This would, in turn, make it a more attractive place to work - and this in turn might improve retention rates and reduce absenteeism.

OnTrack Dynamics developed the initial concept and workshops. It was intended that the course would be made available as an 'off the shelf' package that could be presented by anyone who followed the detailed Facilitator's Manual. There was also a suggestion that it be accredited.

The program was trialled at Midfield Meats, Warrnambool, between March 2003 and May 2004, as a joint initiative between Midfield, Meat & Livestock Australia (MLA) and the Australian Meat Processors Corporation (AMPC). Some managers and supervisors had attended a previous session run by On Track, but Midfield did not have a history of running staff training in areas such as interpersonal skills.

The Pilot involved thirty-four of Midfield's senior and middle managers and supervisors and thirty employees identified as having potential for advancement. Each participant attended one of a series of six weekend workshops held over a four month period in 2003.

Although there was some talk of the possibility of further sessions, the program was originally conceived and funded as a one-off activity. However, the success of the first series (Stage 1) led to the development of a further set of workshops (Stage 2). Only two workshops of the Stage 2 workshops were actually held.

2.1.2 Evaluating the program

Formal monitoring of the program began just prior to commencement of the workshops and continued for 12 months after the last Stage 1 workshop. The process was quite extensive and involved:

- facilitation of one pre-workshop meeting with Midfield management and OnTrack personnel to align aims and content.
- pre-workshop interviews with 50% of intended participants.
- observation of half of the total number of workshops, with verbal and written feedback provided during the process to the facilitator and the OnTrack manager to help with the design of subsequent workshops.
- collection and analysis of workshop feedback sheets from all participants.
- post-workshop interviews involving some 70% of participants at 3 months, 6 months and 12 months.
- follow-up interviews with supervisors
- assistance with video design and video interviews
- on-going interaction and formal interviews with OnTrack personnel, Midfield senior managers and the Midfield training officer.

2.2 Start-up

2.2.1 Establishing company goals

Despite extensive liaison between the manager of OnTrack and Midfield over an extended period, the Midfield Senior management team had not been asked specifically articulate their goals for the program until a meeting called by the evaluator just prior to the launch of the workshops.

At her request, senior managers stated that they wanted a program that would:

- help managers and supervisors manage up, across and down
- improve communication and problem solving skills
- support the career development of promising young people.

They particularly stressed the need for the workshops to be closely related to practical work situations, and asked to avoid anything that could be seen as *warm and fuzzy* or *tree hugging*. (They based this on experience of the earlier OnTrack workshop, which they felt had gone too far in this direction.) They also decided to shift the employee focus from trainees who had been with the company for less than 12 months to any employee seen to have leadership potential. (See Box 2.1 for the full list of agreed goals).

Personal Directions Program – Company goals

- To improve employee understanding of company philosophy and operations
- To improve skills in managing up
- To improve understanding and communication across the company
- To improve skills in managing down
- To ensure participants take away at least one message or skill of personal significance
- To decrease absenteeism
- To assist promising employees in developing their careers

The workshop facilitator had been unable to attend the meeting with management, and it later transpired that she was not forwarded the minutes or informed by the OnTrack representative of Midfield's goals, expectations or concerns.

Box 2.1 Company goals for the Personal Directions Program

2.2.2 Workshop planning

Prior to the goal-setting meeting with senior management, OnTrack Dynamics had prepared extensive facilitator and participant manuals. The content was generic, focusing on abstract conceptual sessions on understanding oneself and others, and theory plus practical activities relating to a range of interpersonal skills.

No changes were made to the general workshop design, content or methodology following the meeting with management, but two new features were added:

- a *'Big Picture' component* for both Leader and Employee workshops in which Midfield's owner was to talk about the diversity of the business, its goals and future plans
- a *career development* component for the Employee workshops that would involve a senior manager talking to participants about his own career path and current role at Midfield.

2.3 Stage 1

2.3.1 Pre-workshop attitudes

In Evaluation interviews held before the workshop series, the majority of supervisors were very clear that they did not want to attend the compulsory workshops. Most resented giving up a weekend without pay. Some openly questioned the need to focus on communication skills, feeling that they were experienced enough to do their jobs without 'that sort of training'.

In contrast, the employees were pleased to have been invited, seeing this as an indication that they were valued. Although some were worried it would be 'like school', all were happy to attend and did not mind that they would not be paid.

2.3.2 The workshop approach

During the first leaders' workshop, changes were made to the original content and methodology. These were subsequently incorporated into the course design, and proved critical to overall effectiveness.

- The approach moved from *course-driven* to *participant-driven*. Early on the first day, participants identified the strengths of working at Midfield and what they saw as key issues. Within the scope of communication, relationship building and local problem solving, they then agreed on those aspects that they saw as priorities. These became the framework for their particular workshop.
- The process evolved quickly from a traditional, structured training session with overheads and reference to the manual to a relaxed interaction with a mix of problem solving and skills training. However, although it appeared to 'just happen', each workshop was skilfully underpinned by a carefully planned structure, with key messages explored and developed throughout. This provided the scaffolding for effective learning without reminding anyone of school!

The facilitator also introduced several models that had not been part of the original material. Participants used these as frameworks for discussion, (See Appendix 1) and identified key communication issues they needed to address (e.g. motivating employees, managing angry workers, stopping racist remarks.) This gave the facilitator 'permission' to introduce particular communication skills and supporting concepts. Once again, participants 'controlled' the agenda, while the facilitator provided the theories, information and skills development activities that would help them to address the problems that concerned them most.

In managing the process, the facilitator:

- recorded key messages on flip chart sheets stuck around the walls and used these as visual reinforcements of discussion
- linked each topic area to the overall workplace context and to the group's issues and priorities
- made connections between issues raised throughout the day.
- used participant comments as an effective cue to signal a shift of focus to a new area
- maintained a sense of flow through the two days

Discussions were often held round individual group flip charts. Participants were used to standing for long periods and said they found it easier to hold a discussion standing in a circle rather than sitting at tables. At participant request, the start time was moved forward, and break times were set to correspond more closely to 'smoko' times. Participants reported that this made it much easier to concentrate, and gave them more time off in the afternoon for weekend activities.

2.3.3 Content

Although each group of participants determined the emphasis of their own workshop, there was a high degree of consistency across all groups. (See Table 2.1.)

Leadership workshops	Employee Workshops
The 'Big Picture' <ul style="list-style-type: none"> • Company goals • Products, markets • Future directions 	The 'Big Picture' <ul style="list-style-type: none"> • Company history & goals. • Products, markets • Sites (paddock to plate production) • Future directions • Career opportunities.
Understanding yourself & others <ul style="list-style-type: none"> • Perception and values • Cultural & gender differences • Goal setting 	Understanding yourself & others <ul style="list-style-type: none"> • Perception and values • Cultural differences • Goal setting • What makes an effective employee or leader? • Dealing with negativity.
Communicating up, down and across <ul style="list-style-type: none"> • Listening • Asking good questions • Preventing & managing conflict • Managing up – being prepared, being assertive not aggressive. 	Communicating up and across <ul style="list-style-type: none"> • Listening • Asking good questions • Influencing • Preventing & managing conflict • Managing bullying & harassment • Helping new people
Skills of effective leadership <ul style="list-style-type: none"> • What makes an effective leader • What makes an effective employee in your area? • Absentees & 'adopt a person' • Managing difficult people 	Steering your own career <ul style="list-style-type: none"> • Understanding your options • Setting clear goals & plans • Doing research • Taking personal responsibility.

Table 2.1. Overview of workshop content areas.

An important feature was the mix of company-related and skills focused activities that took the workshops beyond generic training sessions. Activities that made a strong impact included:

- talks by the Chief Executive and senior managers about company markets and future product plans
- senior managers' talks about their career histories and roles
- discussion about what makes an effective leader or employee and the concept of the 'above the line' and 'below the line' employee. (See Appendix 1)
- conflict management role plays
- the jelly bean game as an introduction to discussion of cultural differences
- career planning processes and career coaching sessions

However, although these aspects were consistently singled out, participants also reported that virtually all elements of the program were important and had had an impact. (See Table 2.2 for a comparison of perceptions across the three employee workshops regarding elements with the highest impact).

Employee Workshop 1	Employee Workshop 2	Employee Workshop 3
Communication skills	Communication Skills Listening & understanding others	Communication skills Feedback Listening & understanding others
Conflict	Conflict (controlling)	Resolving conflict
Self esteem, building confidence		Having a positive attitude and encouraging others
Hearing what others think. Realising everyone has same hassles.	Group discussions	Getting to know each other Follow up in own group
Meeting people from different areas Speakers Colin visiting & talking *****	Explaining other areas at Midfield	Speakers *** Better understanding of Midfield.
Careers	Leadership and career focus.	Career goals
Ways of handling situations differently	Planning	New, varied ways of solving problems . Dealing with every day jobs in a better way
Toys. Early start Sunday		Group activities. Freedom. Relaxed environment and use of outdoors

Table 2.2 Workshop elements with the highest impact: Participant perceptions

The evaluation process as a motivator

In the months following the workshops, most participants had at least one interview with the evaluator, while most had two or even three sessions, some of which were taped for the video being made about the pilot program. These interviews appear to have played a part in reinforcing new behaviours because they provided an opportunity for participants to reflect on what they had been doing and why. The process of trying to explain this to someone else encouraged insights and acted as a motivator to continue trying new behaviours.

2.4 Stage 2

Although all parties had acknowledged that the initial workshops would not be enough on their own to bring about the improvements sought by management, no specific plans had been made for follow up, and no resources had been allocated. This was reasonable under the circumstances as no-one was sure of the reception the pilot would receive – it was very much a case of ‘wait and see’. However, the success of the workshops from a management perspective, coupled with participant requests, led to the development of the second stage, which aimed to reinforce key messages and go into more depth in areas of participant interest.

A range of options based on initial input from workshop participants was developed from which three were selected:

- a debriefing session for supervisors intended to provide an opportunity to share experiences of using a new approach, reinforce and possibly formalise, the 'Adopt a person' program.
- an advanced skills workshop on conflict resolution
- an introductory workshop on stress management

A submission for funding was developed soon after the final Stage 1 workshops, but it was some months before MLA approved funding. This delay, combined with scheduling difficulties, meant the program had lost momentum by the time the next round began. During the downtime, several events also occurred that were to have an impact on the outcome of Stage 2 - and indeed on the future of the whole pilot program:

- the training officer who had been responsible for organising the workshops at Midfield went overseas and was not replaced, so the onus of promoting Stage 2 programs and organising logistics became yet another chore for an already overextended senior manager.
- a falling out within the OnTrack Dynamics team (largely related to the fact that the facilitator had changed the original program), meant that the original facilitator was not retained for the second series.

a senior manager and supervisors had a major falling out. Supervisors felt that he was not trying to put any of the workshop conflict resolution skills into practice.

Three new facilitators were introduced for Stage 2. The two sessions on stress and conflict resolution were not effectively promoted, and the dates were changed several times. They were poorly attended but well received by those who did go.

Due to the problems occurring at that time, most supervisors refused to attend the debriefing session. The eight participants who did argued that they were expected to keep their tempers and go to courses, while, they claimed, a senior manager had learnt nothing from his participation and did as he liked. A new facilitator unfamiliar with the content of the original workshops, or the politics of the situation conducted the session. The facilitator reported the litany of complaints back to management in writing, in a tone that put them on the defensive. Midfield management cancelled the rest of the workshops on the basis that the program had 'lost its way', and was causing communication problems rather than alleviating them.

Following the demise of Stage 2, there were no further formal programs. However, Midfield management supported the updating of the original video to cover developments over the 12-month monitoring period. They were also happy to assist with conference presentations about the program.

In a final debrief, they reiterated their satisfaction with Stage 1 and intimated that they would like to make some sort of workshop program for supervisors an annual event. However, they expressed doubts about the usefulness of the employee program because it raised expectations that the company could not meet.

They identified a number of problems associated with Stage 2– the delay in starting, lack of time and personnel to make arrangements - but believed the key issue was the inappropriateness of the supervisor debrief. In terms of learning for the future, one influential senior manager

emphasised the importance of employing a skilled facilitator who is well briefed on company operations and expectations, and, once started, of maintaining continuity of facilitator if possible. He also reiterated the need to conduct constructive sessions that did not undermine company management.

2.5 Key messages

- Key aspects of the original Personal Directions program did not align with the company's stated goals or expectations. However, the new process that was developed during the first workshop proved to be highly effective in capturing participants' interest and providing a non-threatening context within which to learn new skills.
- The new version of the program was tailored not only to the needs of the company but also to priority areas identified by each workshop group. The move from *course-driven* to *participant-driven* was a key factor in the overall success, as was the expertise of the facilitator in shaping and managing the process.
- The mix of company-related and skills focused activities distinguished the workshops from generic training sessions, and gave them relevance and power.
- The delay in approving funding for Stage 2 had a significant impact. The loss of continuity combined with a change of facilitator and reversion to a training format brought Stage 2 to an abrupt end.
- This is an indicator of how sensitively programs such as these must be planned and implemented, and emphasises the importance of choosing an appropriate facilitator and working to ensure continuity over time.

3 Outcomes

3.1 Evaluating impact on the company

The program was evaluated against the original goals established in conjunction with senior management (See Fig 3.1.)

Personal Directions Program – Company goals

- To improve employee understanding of company philosophy and operations
- To improve skills in managing up
- To improve understanding and communication across the company
- To improve skills in managing down
- To ensure participants take away at least one message or skill of personal significance
- To decrease absenteeism
- To assist promising employees in developing their careers
- To improve retention.

Box 3.1 Personal Directions Program: Company Goals.

There was strong qualitative evidence to suggest that the goals relevant to individual attendees were achieved, and that the program had assisted in lowering absenteeism. However, the impact on retention was less clear. While it had clearly changed some employees' attitudes about their work and about the company, it may actually have undermined the attitudes of some promising staff members.

Virtually all positive changes identified were attributable to the original workshops (Stage 1) and not to those in Stage 2.

The indicators used to measure the program's impact against company goals are summarised in Table 3.1 at the end of this chapter, with a number of examples discussed below.

3.2 Impact on individuals

3.2.1 Leaders

Despite widespread cynicism from supervisors prior to the workshops, all of those interviewed reported finding the experience worthwhile, and identified one or more aspects that had influenced their attitude or behaviour in some way.

Every supervisor interviewed had taken steps to implement personal goals, and was able to give examples of what they had done. e.g. prioritising, keeping notes on issues, focusing thoughts and preparing a case before taking up an issue with senior managers, delegating, identifying and developing successors and coaching new supervisors.

- Three experienced supervisors felt the workshops validated what they were already doing, but said they were surprised to find they could still learn something new. They also appreciated the opportunity to share their knowledge and experience with younger supervisors.
- Most supervisors had adopted an employee (usually an habitual absentee), and were finding that their efforts were making a difference – in some cases, the changes were quite dramatic.
- 80% of supervisors said they would be interested in follow-up workshops and other activities (although they would still prefer it if these were paid and not held on a weekend.)

Those interviewed several times over a 12-month period reported they were maintaining new behaviours, and were able to support this assertion with examples.

There was an identifiable change in the way supervisors interacted with each other. This was reported independently by two senior managers and four supervisors. They described various instances, such as supervisors organising to visit each other to learn more about what happened in another part of the plant and giving advance warning of problems in their room that might impact further down the line.

Over the 12-month period, supervisors and senior managers also reported:

- A major drop in absentees, particularly in perennial problem areas such as the load out.

- A significant reduction in the number of employees referred up the line to senior managers for disciplining.

The Chief Executive reported that one of the most important outcomes for him was that it had given him an insight into several people who participated in the workshops and completely changed his perception of them.

Several people commented that the interviews with the evaluator also played a part in reinforcing new behaviours. They felt these sessions gave them a chance to think about what they had been doing and why, and the process of trying to explain this to someone else seemed to act as a motivator for them to continue.

3.2.2 Employees

Those invited to the Employee workshops had been keen to attend and saw the invitation as a message that the company valued them. After the event, almost all reported they had found the workshops exactly right in every respect, and suggested they should not be changed in any way!

In the five months after the Stage 1 workshops, employees reported they had:

- A much better understanding of company operations and the range of opportunities available to them.
- Broader options for career development than aiming to become the supervisor of their floor.
- Increased motivation to get on in the company.
- Useful strategies to get information and assistance.
- An improved network of contacts including supervisors, managers and employees in other areas.
- Better communication and conflict management skills.

All those interviewed had attempted to implement their personal goals and taken the first step towards achieving their identified career goals. Most had taken it upon themselves to 'adopt' a new employee and make them feel at home. Almost all requested further workshops.

3.2.3 Did the changes last?

There were both positive and negative impacts over the course of 12 months. A number of employees reported noticeable improvements in their supervisors' approach to employees. They also observed a drop in conflict in the areas in which they worked. There was a strong correlation between their stories and those of supervisors and senior managers which suggested that such changes had in fact occurred and been sustained.

Some employees who had been having personal difficulties reported they had 'turned their lives around' and attributed this to the impact of the workshops. One person made an effort to get off drugs and within a year had been promoted to leading hand.

The workshops appear to have had a particular impact on some employees who had been with the company since they were 15 and were known for being 'a problem'. Although still young and fairly immature, they had developed a high level of skill as slaughtermen and felt they were owed

a promotion after 6 or 7 years with the company. Before the workshops, one had been planning to leave. He reported that the workshop actually helped him rethink his expectations and get a sense of the leadership skills he would need to develop to take on a higher-level role. Another realised he needed qualifications and was inspired to return to a TAFE course he had half finished. A third curbed his aggressive behaviour to such an extent that he was in fact promoted to leading hand six months after the workshop.

However, after 12 months, another less positive outcome also became apparent. A number of participants who had been enthusiastic about the program, and about the company, had become cynical and unhappy because they felt no-one in management had shown any interest in them since the program finished. Several had been with the company for some years without promotion and were jaded. One had asked to learn air knives but after a short trial had been judged to be too slow and put back in her original position without further explanation. No-one had discussed with her what had happened, or given her any sign of what she might do in the future, and she was quite despondent. A relative newcomer with enormous enthusiasm and potential had been badly injured in a bone saw accident and was on the verge of leaving because he could see no way of transferring to sales where he felt he had a future.

3.3 Organisational impacts

3.3.1 Impact on absenteeism

A useful, and potentially transferable, approach to absenteeism emerged from the workshop process.

The “Above the line/below the line’ visual model helped supervisors rethink their perceptions about the extent of absenteeism, and share ideas about what makes a good employee. The ‘Adopt a Person’ concept that emerged during the first workshop and was developed through the others, gave supervisors a relatively straightforward, achievable way of making a difference to a problem that many had seen as an unchangeable fact of their lives. When transferred to Employee workshops, it reminded participants that they could make a difference to the quality of a new person’s experience and led to many deciding to ‘adopt’ a new person and act as their unofficial buddy.

During the workshops, supervisors identified a perceived barrier to addressing absenteeism. Supervisors believed their role was to get angry with someone they believed had been absent without good cause but that it was senior management’s role to discipline etc. They did not perceive themselves as having any power to influence outcomes. Senior management confirmed that they had taken full responsibility for managing absenteeism issues, in belief that this would make supervisors workload easier and help them to concentrate on what was happening to production. However, they could see that there might be benefits in changing this arrangement. This discussion led to an organisational systems change. Supervisors’ roles and responsibilities were reviewed, and a draft duty statement developed that gave them broader powers as the first line managers of absenteeism and other personnel issues. This was a significant departure from the existing top down ‘Command and Control’ management model that had allowed very little delegation to middle management in any area.

This official change in supervisor role helped to facilitate the development of the ‘Adopt a person’ scheme. At the workshops, each supervisor had selected a person he believed he might be able to influence to come to work more regularly, and devised strategies to bring this about. All supervisors put their plans into practice and reported finding this explicit focus on one person at a time to be extremely effective.

The supervisors were clearly proud of their achievements, and success with one person reinforced their confidence and interest in working with others. Some starting focusing also on 'average' employees to motivate them to perform more effectively.

Over the 12 months following the Stage 1 workshops, senior managers reported a sustained decline in absenteeism across the plant, but particularly in several areas that had been habitually plagued by the problem (e.g. load out).

3.3.2 Impact on retention.

The impact of the program on retention was not all positive, but it did give an inkling of its potential to make a real difference.

There was no doubt that the workshops made a real difference to employees' understanding of the company and motivated them to build their careers. Several employees made huge changes to their behaviour as a direct result of the coaching they received during the workshops. The informal employee buddy system also appears to have helped the company retain some new workforce entrants who were 'adopted' by employee workshop participants. There were several stories of people who later reported that they had been ready to leave on the first day but had changed their minds when one of the experienced workers had taken them 'under their wing'.

However, any retention program is a two edged sword. There are indications that the program may have inspired several employees and supervisors with the confidence and skills to take the plunge and leave the company for higher paid positions elsewhere. Perhaps of more concern however, is the fact that the program raised participant expectations but did not follow through. Although several employee participants were promoted in the months after the workshops, those who had been interested in sideways moves to learn new skills and knowledge got no response from the company at all. Over time, this proved to be counter productive. After 12 months, some of the most promising and enthusiastic employees had become cynical, and several were thinking of leaving. It should be pointed out that these were not rabble-rousers with false expectations, and that the workshop facilitator had been careful not to raise false hopes. In fact, in the career planning session, she emphasised that:

- Promotion was not likely in the short term.
- Supervisor roles were extremely limited, but that other possibilities to extend knowledge and experience existed in other parts of the company.
- The responsibility for developing their careers rested with the participants themselves.

The very existence of the workshops had sent a message that the company cared, and the Chief Executive and senior managers had told participants that they had been chosen for the workshops because they 'had potential'. (Months later, some participants started to ask, 'Potential for what?'). In the workshops, senior managers raised interest by talking about different aspects of the company, and one actually asked for volunteers who might be interested in work shadowing his role. Although several participants did express an interest in doing so, nothing actually happened.

The main problem appears to be that there were no formal processes in place to support career development through sideways moves, and company managers were spread too thinly to turn their attentions to a new area. There was simply no-one available to oversee the establishment or ongoing maintenance of even a limited formal career path program, given that it was not seen as a priority in the scheme of things.

The career focus was introduced to the workshops at the company's request, but needed to be better thought through from the beginning. This particular outcome demonstrates that supposedly 'one-off' workshops can set up expectations amongst participants that need to be carefully managed as part of a longer term process. A company aiming to improve retention will need to implement a suite of complementary strategies to achieve intended, rather than unintended, consequences.

3.4 Key messages

- A wealth of qualitative evidence demonstrates that the workshops exceeded participants' expectations and achieved the company's goals in regard to individual attendees.
- Many supervisors put new behaviours into practice with positive results and started paying more attention (and taking some responsibility) for company activities outside of their own areas.
- Senior managers, supervisors and employees all reported a reduction in conflict and in staff referred to management for disciplining.
- The Chief Executive gained insights into several co-participants that changed his negative perceptions of them and increased his sense of their value to the company.
- The 'Adopt a person' concept combined with skills taught in the workshops and a formal change of supervisor responsibilities assisted in lowering absenteeism.
- The impact on retention was more difficult to gauge. While several participants increased their confidence and changed unacceptable behaviours to such an extent that they were promoted within 6 months of attending the program, the company's apparent failure to support the majority of participants after the event led to growing cynicism and disillusionment.

Table 3.1. Key indicators of program impact

Aim	Leaders' workshops	Employee workshops
To improve understanding of company philosophy and operations	<p>85% of those interviewed identified company information and insights as a significant aspect of content.</p> <p>Each identified aspects they had not known e.g. overseas markets, trade in gall stones, connection to Blunstone Boots, new Korean market.</p> <p>Participants referred to key messages about company philosophy during workshops & in subsequent interviews.</p>	<p>Before workshops, few participants had had any idea of the breadth of company operations, All participants identified company speakers as a highlight and reported being inspired/interested/excited to find out more.</p>
To improve skills in managing up	<p>3 supervisors tried new strategies to prepare for discussions with senior managers reported improvement listened to, and got better outcomes.</p> <p>Participants enjoyed opportunity to interact with the Chairman. No one reported feeling intimidated. All felt could say what they wanted to.</p> <p>Senior managers report more supervisors being proactive in reporting problems – less defensive, more constructive.</p>	<p>One third gave examples of putting the practical skills into play with good results.</p> <p>Two reported that they had tried but received a negative response from their supervisors so had not tried again.</p> <p>One had lost his temper and had his pay docked.</p>
To improve understanding and communication across company	<p>All valued opportunity to spend time with people from other part of the company.</p> <p>Several supervisors and a leading hand organised visits to other areas to find out more about operations so they could improve interaction.</p> <p>Supervisors now sending advance warning of problems, slow downs to each other. This is a significant shift in behaviour.</p>	<p>Now thought about connection of what they did to what other people were doing.</p> <p>Felt they had learnt a lot from others in different parts of the company.</p> <p>Enjoyed catching up with new friends on site.</p> <p>Many now saw themselves as role models. Reported using new skills to defuse potential conflict situations.</p>
To improve managing down.	<p>The Chairman felt he had gained insight into several people and changed his opinion of their capabilities.</p> <p>Clarification/changes to job descriptions to give supervisors more autonomy in dealing with employees.</p> <p>Fewer formal disciplining reports to senior mgmnt of employees by supervisors.</p> <p>Supervisors report changes in way they interact with employees- (not yelling, giving reasons for decisions, asking for ideas). Supported by observations of senior mgmnt and other employees interviewed.</p>	<p>Most proud to act as a role models.</p> <p>Several volunteered to train new people to room.</p> <p>Two had trained someone else to take over their job.</p>
To ensure participants take away something	<p>Each participant identified several messages, techniques, insights that had</p>	<p>Everyone identified something that had made a difference to him or her personally. Most volunteered these comments at</p>

No Bull – growing people does grow business

Aim	Leaders' workshops	Employee workshops
personally significant	made an impact.	the start of the interview without a question or prompt.
To decrease absenteeism	<p>Strong support for concept of 'Adopt a person'</p> <p>Most supervisors identified one or two people, & reported of major improvements in absenteeism of individuals targeted plus others.</p> <p>12 months on company reported significant lowering of absenteeism asp in areas traditionally problems (eg load out)</p>	<p>Helping new people & making them feel at home one of messages that had a real impact. Workshop gave 'permission' to do this, highlighted why important. Anecdotal evidence that 'helping hand' made difference to retention of new entrants in some rooms.</p>
To assist employees in developing career paths.	<p>Several supervisors identified young people they would assist informally.</p> <p>Company resisted suggestion that they organise any formal approach.</p>	<p>Almost all reported initiating career plans post workshop. Most had initiated discussions with Chairman and/or supervisors. Two had enrolled in TAFE courses.</p>
To improve retention	<p>Little turnover at this level, but one supervisor took promotion outside company – and took his adoptee with him!</p> <p>Before the course, another had been planning to leave, but said he was now more positive towards company – decided to use 'adopt a person' to train a successor.</p> <p>One promoted employee wins job outside company.</p>	<p>Initial indications highly positive, but 12 months later significant shift.</p> <p>All agreed work climate had improved, but those who had seen no change in work circumstances were becoming increasingly dissatisfied or cynical.</p> <p>Three employees, who had been seen as 'difficult' changed behaviour, were promoted & highly productive.</p> <p>Two who had been seen as promising were dejected & ready to leave after 12 months with no new opportunities.</p> <p>One employee had been tried in higher position, but deflated when told air knife skills not good enough.</p> <p>Four had stopped thinking about new positions & were doing nothing to advance themselves, believing the company had no interest in moving them sideways.</p> <p>Three not trying but saw it as own fault</p> <p>Course gave two confidence to take on new study after failing at school.</p> <p>Two moved interstate for personal reasons</p>

4 What have we learnt?

4.1 Should the original program have been changed?

The original *Personal Directions* program was conceived as a training workshop to promote personal growth. There was only ever a tenuous connection between individual self-improvement and any organisational change that would influence absenteeism and retention. The underlying argument seemed to be, “If you know yourself and understand other people better you will act in new ways and therefore everyone will want to come to work every day.”

Although this appears to be common sense, it is based on the assumption that focusing on individuals for one weekend workshop will make a measurable difference across the company over time. This in itself is questionable, and there is little in the original course plans and manuals to suggest that either individual or organisational change would have occurred if the proposed program had been followed.

The original content consisted of a set of concepts and activities that appeared to have been culled from many existing training manuals (and was potentially in breach of copyright). Importantly, there were no in-built structures to help participants make direct links to the practicalities of their day to day workplace operations.

Observation of the first day of the first workshop (confirmed by feedback from participants) suggested that the content and format would not meet the company’s needs, or attract individual participants’ interest. There was definitely a need for immediate and significant changes in emphasis, methodology and content. It was imperative that these changes happened before the end of the first workshop because negative word of mouth would simply have sunk the program. Thus, the pilot worked as a pilot should, providing an opportunity to try things and make changes. In this case, the program that evolved was significantly different to that which had been proposed, and proved highly effective.

4.2 Changing behaviour: Why did Stage 1 work?

The evidence from all sources correlates to suggest that the Stage 1 workshops made a strong initial impression on virtually all participants, and led to genuine learning and change as each participant implemented something they had learned.

4.2.1 Critical success factors

Most participants walked into the sessions with preconceptions that could have acted as barriers to their engagement with the process. They changed their minds for several reasons. Feedback suggests that the following elements were critical to success:

a. The workshops involved more than skills training

- Company information, skills training, workplace issues and problem solving were integrated throughout.
- Each training component had a clear purpose and could be easily linked back to specific workplace contexts.
-

The company 'Big picture' component expanded everyone's horizons and helped them appreciate better where they contributed and how what they did impacted on other workers, on customers and on company viability

b. Participants could immediately see the relevance

- The program targeted issues that everyone – not just management- believed to be important, and gave participants the opportunity to identify these for themselves.
- Supervisors identified absenteeism, retention, and communication as priority issues.
- Employees were concerned about poor communication, and about their own futures within the company.
- Asking each group to identify their priorities as part of the introductory process built a high degree of ownership of the process and commitment to some practical outcomes.

c. This training wasn't like school

This was clearly not a normal meat training program and it did not in any way resemble school- a very important point as most participants reported having little success at school.

- Held in an attractive venue off-site, not in the company training room.
- Informal interaction, with an interesting variety of indoor and outdoor activities.
- High quality catering sent a message that the company valued the program and participants.

d. There was a focus on active transfer of learning from workshop to workplace

- There was an emphasis on practical 'How to' processes, opportunities to practice these safely, and support to transfer them to the workplace and other parts of participants' lives. e.g. The personal goal setting process provided a step-by-step process to identify and achieve meaningful goals, with an emphasis on how to get started. (Employees even role-played the first step in their career development quest and identified strategies to overcome possible barriers).

-

e. The facilitator had a high level of expertise

The facilitator was an expert trainer and manager who had been responsible for implementing major change programs in the automotive industry.

- She established rapport quickly. She was flexible enough to change the program as required and able to make each aspect of the workshop relevant to its participants and aligned to company needs because she could draw on a breadth and depth of knowledge gained in other industrial settings.

- Despite lack of background in the meat industry, she established her credibility through judicious use of anecdotes from other industries and her ability to listen and respond sensibly to issues raised.

f. Senior managers were directly involved

- The direct involvement of senior managers throughout sent a strong message about company commitment to the program and to its staff.
- The Chief Executive opened each workshop, gave insights into the business operations and plans, explained why participants had been invited and how the workshops supported the business. He or another senior manager also participated in each Leaders' workshop. (No-one could say – Why didn't *they* come?)
- Several senior managers gave engaging, informal presentations at Employee workshops that captured participant interest and imagination.

g. The workshops promoted interconnectedness and collaboration

Workshops were designed to promote cross company interaction. Each workshop group was deliberately mixed in terms of company area, skills level, age, gender, ethnicity, and there were many opportunities for interaction within the workshop itself and socially during breaks. There was an emphasis throughout on the impact of actions in one part of the plant on people and productivity in other parts.

Promoting Individual change : Why did the workshops work?

- **More than skills training.** Company information + Skills training + of workplace issues and practical problem solving.
- **Immediate relevance.** Targeted issues that everyone – not just management - believed to be important.
- **Not like school.**
- **Active transfer** of practical skills to the 'real' world.
- **Expert facilitation.**
- **Direct involvement of senior managers.**
- **Promoted interconnectedness and collaboration**
- **Interconnectedness**

Box 4.1. Critical features of workshop design influencing individual change

4.3 Was the program effective in driving organisational change?

4.3.1 A link between individual and organisational change

Company managers, supervisors and employees who participated in the program perceived a connection between individual change and broader company change.

There were reports from all levels of a noticeable change in the general tone across the site. People were calmer, fewer disagreements were escalating into major conflict, and consequently, fewer people were being sent to senior management for disciplining. Company members interviewed attributed this to a noticeable change in approach by some supervisors, and the

active involvement of employees who had been part of the program. Other instances cited included a direct cause and effect relationship between:

- The informal employee buddy system and the retention of some new workforce entrants.
- Supervisors taking responsibility for alerting managers and peers to potential problems and reduction in inter-room conflict, production delays and quality issues.
- The increased confidence and ability of some supervisors to alert senior managers to issues and the emergence of a more proactive approach to problem solving generally.
- Adopt a person and the lowering of absentee rates.

Although there is no hard data to support the reports from all levels of the company, it is of some significance that so many people believed there was a connection. This in itself may help to reinforce the behaviours over time.

It is also important to note that these organisational impacts did not just flow from the training in interpersonal skills. The revamped program sought to actively promote an organisational perspective, and included several models and concepts that worked as scaffolding to assist the process.

4.3.2 Organisational change: Critical success features

The 'Big Picture' information about the company provided a context for the issues raised. This was reinforced by the cross-company mix in each workshop which:

- brought people with different knowledge and perspectives together, and shifted each individual's focus on his/her own room.
- emphasised the shared nature of most problems.
- gave a personal face to a room. ('I can't put those bones in there because it will make life hard for Jim in the offal room vs. I'm not going to pick those bones out just because someone said the offal room doesn't like it'.)

The use of simple models and concepts with a name, such as *Above the Line/Below the line*, and *Adopt a Person* gave participants new perceptions and a common language to talk about issues (See Appendix 1 for more detail of the models.)

Critical success factors influencing organisational change

- Big Picture focus on understanding what the company does, where it is headed and how each area contributes.
- Cross company mix of participants in each workshop
- Use of simple models and concepts challenged perceptions and provided a common language.

The program achieved the company's immediate goals, but although it provided a potentially solid foundation for lasting organisational change, the company did not have the high level goals, strategies or resources to take this further.

4.4 Retention: strategies and barriers to change

4.4.1 Understanding the context

Holding the workshops at all represented a major change of behaviour for the company. The career component was added just before the workshops began and in hindsight may have needed more thought, given that the company did not have a history of formal workforce planning.

The workshop process worked so well because it was more than a generic skills program and attempted to help participants consider interpersonal skills within the context of their workplace. However, by its very nature, it also built staff expectations. Once employees are encouraged by management to think more broadly about the company and about their roles within it, or asked to play a role in maintaining a convivial workplace, expectations will be raised. People get enthusiastic and their commitment to the company increases. To capitalise on this, there must be follow-up. Although company management gave the approach their full support in principle, they had not thought through the implications in practice, and were not in a position to build on the foundation of skills and enthusiasm established during the workshops.

As in many meat processors, the main focus was on ensuring there were enough workers to do the job on a daily basis – sometimes a major and time consuming challenge in itself. Promotions were usually made by the Chief Executive, largely on the basis of gut feel. He tended to place people like himself in key positions- employing or promoting those who showed a high degree of autonomy, took complete responsibility for a role (usually without delegating at all) and who were prepared to work very long hours.

As the company continued to grow, key senior and middle managers had been shouldering significant responsibility and working under enormous pressure. Although their positions, knowledge and experience were crucial to the company, they had no backup person learning their job. There was no formal succession planning.

In the case of employees, senior managers accepted that only a few employees on the floor would make it through to supervisor rank, while most did not. They could not see how they could establish a system to encourage some staff to move sideways into new jobs or provide trainee manager opportunities. They therefore decided that the workshop career emphasis they themselves had asked for was a mistake because it raised employee hopes.

It may indeed have been premature to include the career component. However, it highlighted a fundamental issue that the company needs to explore. Can it afford to continue as it is? Will it be possible to retain promising staff without developing some form of career path? What is the risk of continuing to operate without clear succession plans?

4.4.2 Ideas for retaining staff

Although supervisors' jobs will always be at a premium, the workshops identified a variety of other options that could help the company develop its staff with potential. Interestingly, each of these suggestions was rejected by senior management for the reasons discussed below.

Mentors for new supervisors.

There were reports that several young and newly appointed supervisors were struggling to cope. Senior managers felt they may simply have made the wrong choices and were considering replacing at least one of these people. However, it appears that the new supervisors had been thrown in the deep end'.

The company had several articulate and highly experienced senior supervisors who were interested in becoming mentors. However, senior management argued that a senior supervisor would seldom be free to meet with a junior supervisor, because the company actively discouraged delegation. (This suggested another avenue for staff development. If senior supervisors were allocated some time to work with junior supervisors in other rooms, they could also give someone in their own room an opportunity to develop their management skills while they were away.)

Job rotation or work shadowing.

Another way of maintaining interest and developing employees was to move people around more often. Some employees signalled that they and others would welcome this opportunity to try different jobs, including working on the farm or even in the offal room or load out if it gave them the experience to progress within the company.

A potential next step from the pilot would have been to provide opportunities for promising employees to gain knowledge and experience in different parts of the company, (a formal version of the way in which several of today's senior managers learnt the roles themselves).

Discussion with senior managers revealed that there was no-one available to oversee even a small program. However, it also emerged that the employees who had volunteered were all considered too useful where they were, and could not be easily replaced. This means that the very skills and knowledge that made these employees leadership material were potentially working to keep them just where they were. Senior managers had not considered the potential implications if the boredom of years in the same place finally got to be too much. (There were two long term, stable employees who were considered invaluable but who both intimated that they were looking for other work.)

Strategies to attract new recruits

Both employees and supervisors were concerned about the image of the company and the industry within the broader community. Most participants were enthusiastic about establishing a small program involving employees to promote the company, especially in the local schools. They felt this had the potential not only to build a positive image outside the company, but also to help those within it to be proud of what they do.

The company had a number of articulate, personable young employees who were enthusiastic about the idea of going back to their schools to explain what they did and promote the company as a good place to work. The company managers who gave workshop presentations would also have made very good ambassadors.

Senior managers were interested in this idea, but again, lack of available management time meant that it was unlikely to be put into practice.

Strategies to retain new recruits

The company gave only limited consideration to the placement of new recruits, or to providing support after the formal induction. Both employees and supervisors had a wealth of suggestions on ways of improving the early experience of newcomers in the hope of reducing the early attrition rate.

Although senior management was interested in reviewing the induction process, this did not happen due to time and production pressures. However, there was certainly potential to involve supervisors and key employees in the planning and implementation of a new approach.

4.4.3 Working with 'troubled' young employees

Many of the company's new recruits were early school leavers, mostly young males who hated school and could not get a job anywhere else. Members of this group still had a lot of growing up to do, often caused trouble and were likely to leave after several years. However, if they made it through they became some of the company's most skilled workers.

Three of those who had been with the company for several years were invited to join the Stage 1 workshops and had benefited greatly, exhibiting marked differences in attitudes and behaviour. Seeing this, several of the most experienced supervisors wanted to run another employee workshop with a mix of high achievers and more of these 'troubled kids'. Another possibility suggested was a mentoring program involving experienced employees or supervisors to help others grow within the job and the company. (A targeted variation of the 'Adopt a person' campaign.)

4.5 Measuring impact

Although senior management appeared to actively support the collection of hard data and identification of performance measures, the company was not well positioned to do this. Although some of the data required did exist, it had not been collected or stored with this purpose in mind. The effort of trying to extract relevant information with limited person power was greater than the potential return, and the job was constantly put off. (Even an offer from MLA of a dedicated person to do the job was not taken up because it would have taken as long to explain what to do as it would to do the job!)

The obvious success of Stage 1 may also have mitigated against further effort. As far as the company was concerned, the workshops had made a difference, so why divert resources unnecessarily? The subsequent abrupt end of Stage 2 then made the question even more academic. The program was no longer operating, so why spend time tracking absentees?

Although some meat companies have highly evolved management information systems, indications (from the MLA Undergraduate program for example) suggest that a number of meat companies may be in a similar situation to Midfield with limited data management and reporting systems. In future programs it may be unreasonable to expect a new purpose-built data collection measuring system to be developed simultaneously- but there is always the possibility that this sort of program will highlight the need for such a thing and become a driver for change in this area.

Possible measures that could be useful are discussed in Appendix 2.

4.6 Key messages

- Feedback on the Pilot made it possible to identify a set of factors that were critical to its effectiveness. These are likely to apply in other contexts and should be taken into account in the design of future programs.
- Specific approaches to absenteeism developed during the workshops could also be utilised in other contexts.

The Pilot demonstrated that it had the potential to be used as a highly effective retention strategy. However, it can't do it alone! The impact of an approach such as this will depend on the willingness and readiness of the company concerned to implement a range of strategies to build and maintain employee interest, enthusiasm, loyalty and skills. Without some understanding and commitment at the beginning, it may be counter productive to proceed.

5 Future Directions

5.1 Key learning for future application

The Pilot demonstrated that longer term organisational benefits are more likely to be achieved if there is a formal focus on both individual and organisational change that is maintained over time. Companies considering a similar approach should consider a set of key issues as part of their planning process.

5.1.1 Establish as a formal change management program.

This program will be more effective if it is conceived and implemented as a formal change management process with a training component, rather than as a training program that will somehow change the company if a few other things are tacked on to it. Treating it as a change program should involve:

- recognition that it is part of an evolutionary, long term process.
- formal articulation of goals and indicators to set the agenda for program design, and frequent revisiting to determine continued relevance.
- debriefings and action learning reviews with key stakeholders as an integral part of the process, with time and other resources required budgeted in advance.
- identification of company structures, systems and processes that support the desired changes, and rethinking of those that may work against it. (e.g. Company discipline policies, supervisor roles and responsibilities, induction processes and placements, promotion criteria, career path and succession planning, school and community promotion activities.)
- maintaining momentum and building quickly on initial learning. e.g. Nominal budget and plans for future stages- even before its shape is determined.

5.1.2 Maintain relevance

- The Workshop design should incorporate both company needs/goals and those of participants, with employee contributions sought where appropriate.
- On-going liaison and formal meetings with management to consider conceptual as well as logistical issues
-

5.1.3 Resource adequately

- Employ facilitators with a high level of expertise in training *and* change management, and involve them in all stages of planning and implementation.
- Ensure there are on-site personnel to coordinate logistics, and provide on going support for participants.
- Maintain continuity of central personnel, both external and internal.

5.1.4 Be flexible

- Proceed through careful planning (and contractual arrangements) with the flexibility to manage rethinking and redesign to respond to what is learnt at each stage.
- Design flexible workshop structures that allow facilitators to respond quickly (within the general scope) to specific needs, interests and priorities.

5.1.5 Monitor and measure

- Establish benchmarks, a monitoring process and indicators as part of the action learning process.
- Establish formal feedback mechanisms with the company and participants to show what is working and reinforce positive changes.

Driving long term change

- Recognise that the process will involve clear goals, a set of related strategies, time and commitment.
- Results = Benchmarking + Training + Staff Involvement & ownership + redesign of company structures & systems.
- Make it relevant to the company and employees.
- Have clear agreed plans but be prepared to change them.
- Gather data, reflect and redesign as part of formal action learning process.

Box 5.1. The program as a vehicle for long term change

6 Options for future delivery

6.1 Managing Up, Down and Across.

The Pilot was originally designed as a series of workshops that would provide a standardised training model that could be used in any context. However, the generic approach had to be replaced because it was clearly not going to suit this company's needs. The key to the effectiveness of the program that evolved lay in the fact that it was tailored. But does this mean inventing every new program from scratch? Not at all.

The new Midfield program provides a basic structure to act as scaffolding in any company. It also offers a useful set of core concepts, models and activities from which any facilitator could draw once a group has identified the areas most relevant to their needs. The secret is to focus on the expert skills of the facilitator rather than trying to capture everything in a manual that could be picked up and 'delivered' by anyone.

A new model –perhaps called *Managing up, Down and Across*- could be based around a small group of highly skilled facilitators/change managers employed as part of an MLA project to improve promote leadership and interpersonal skills, and impact on absenteeism and retention.

A facilitator would work with an interested company to define the specific goals, scope and logistics of each program. They would then design and run workshops, drawing on a range of pre-prepared elements and developing new ones tailored to company and participant needs and interests. Selection of facilitators is discussed in more detail in Appendix 3.

Goals and content could vary considerably e.g.

- Improving leadership skills inducting 6 month trainees, or
- developing promising young people or
- reducing ethnic tensions, or
- reducing conflict in a specific area

A key aspect of the approach that distinguishes it from training programs is that the facilitator would work with the company to review existing structures and systems, and to integrate new strategies into the mainstream of their business.

There may also be useful links into other business improvement programs currently being piloted by MLA, such as Scoretrak and IMPROOVE-IT. These should be explored further.

It would be possible to aim a program at specific goals without focusing directly on absentee or retention issues. However, there is potential to build on what has been learnt from the Pilot within MLA's broader plans to address retention within the industry.

6.2 Key messages

- The Midfield project has provided the foundations of a flexible program that can be tailored to suit the needs of companies across the industry. However, the development of a program robust enough to suit a range of company contexts is an R&D process in its own right.
- The MLA retention program offers an industry-wide context for the development and testing of a more sophisticated process to develop and test a range of strategies aimed at improving retention. The Midfield workshop process would provide a blueprint for the design and delivery of a number of the components.
- Several other components could also be developed to provide a useful package of support materials. These might include templates for setting goals and expectations, and a simple approach to support on-going monitoring of impact on site.
- A common monitoring and reporting process used by a number of companies would provide valuable data that would increase industry understanding of retention patterns and factors impacting on positively and negatively on retention.

7 Conclusions and recommendations

7.1 Conclusions

7.1.1 Significant impact on individual behaviour

The Innovative Employee Retention Pilot program clearly had a positive impact on the individual behaviour of all participants. It was influential in bringing about short term behaviour changes, and many of these were maintained over the 12 month period of the evaluation process.

7.1.2 Moderate impact on organisational change

Some aspects of the program had a major impact on individual knowledge and perception that then also had a broader impact on company performance.

Providing a company 'Big Picture' helped participants appreciate their own contribution, while the very act of bringing people together from different parts of the site as part of a focused and well structured program influenced productivity as participants gained insights into the problems experienced in others parts of the plant that were caused by actions elsewhere.

The emergence of 'Adopt a person' as a formalised approach to absenteeism captured participants' imaginations and gave them a way of managing a problem most had previously believed to be beyond their control.

Initially , the program showed real potential as a way of building employee commitment, and introducing them to the skills they would need to build their careers within the company. Several employee participants did in fact go on to promotion positions, including two who had previously been seen as lacking motivation, or exhibiting attitude and behaviour problems that would have precluded promotion.

However, lack of company follow-up proved to be counter productive for most participants. After 12 months, some of the most promising and enthusiastic employees had become cynical, and several were thinking of leaving. It also appears that the program may have inspired several other employees and a supervisor with the confidence and skills to leave the company for higher paid positions elsewhere.

Future Directions

There is clearly a role for a program such as this within the industry, and it may be particularly useful in companies that have had little exposure to formal organisational and individual development programs.

The idea for the original program would not have been seen as innovative in many industries, but in meat processing it represented a genuine innovation as a direct focus on interpersonal skills or 'people based' strategies to address issue such as absenteeism do not appear widespread. The program that evolved during the Pilot would probably be considered innovative in a number of industries, not just in meat- but is this industry ready for such a thing? Recent interest in the video about the pilot program, and involvement in MLA sponsored Retention forums suggest that the time is right to make the program available to companies prepared to make more a long term commitment.

The Pilot provides a blueprint for the training aspects of future programs, while demonstrating the importance of managing the whole process as a change program with the training component designed to meet a company's specified goals.

The focus should not be on a production of a standardised program available off the shelf as originally envisaged. There are already many training programs available through the VET system to fill this need. Future development of a program suited to the industry should focus on ways of making a pool of experienced change manager/facilitators available to companies wishing to implement their own programs.

The key resource provided by MLA should be people with the expertise to manage change programs, recognise the importance of structures and systems, and design and facilitate the training component. Their job will be made easier if they share core concepts, identify a small range of effective models and activities and develop core materials based on, but not limited to, those that have already proved to be effective in the pilot.

This approach could be effectively incorporated into an industry wide program to address retention issues. However, the Pilot approach could also become an effective vehicle for the achievement of other results, such as a reduction in absenteeism, ethnic tension, conflict or stress levels.

7.2 Recommendations

MLA should not consider making available a standardised training program based on the original Personal Directions program. However, it should explore the potential to establish a mechanism to facilitate uptake of tailored versions of the program based on the approach developed during Stage 1 of the pilot. This could be called *Managing Up, down and Across*.

The major element of an industry wide mechanism would be a small pool of highly experienced change managers who could work with individual companies while collaborating to bring about industry wide change in perceptions and practices.

A core set of support materials could be developed based on the revised workshop process and content. Further materials to be developed would provide templates to help a company establish the support structures and strategies to leverage change beyond the workshops themselves.

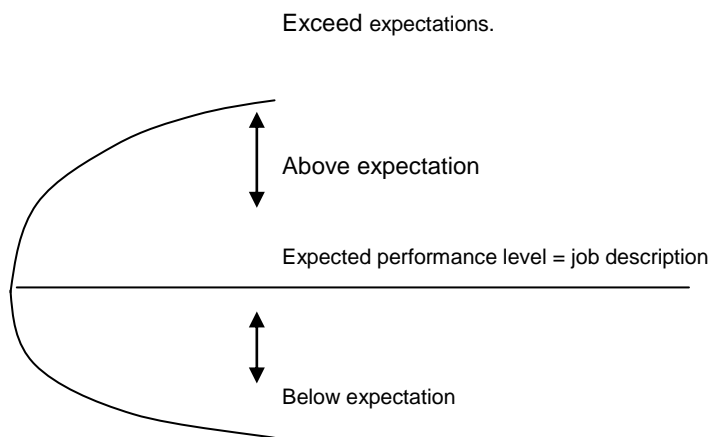
Ways of linking the program into the broader retention strategy should be considered, with a particular focus on using the process as a means of benchmarking and monitoring change in this area across the industry.

8 Appendices

8.1 Appendix 1. Workshop models with high impact

Model 1: Above The Line/Below The Line

This simple model is based on the premise that employees do not all perform equally. Some do exactly as asked (per job description) and this sets 'the line.' Some perform above expectation, some far beyond expectation. 'Below the line' do not meet basic expectations.



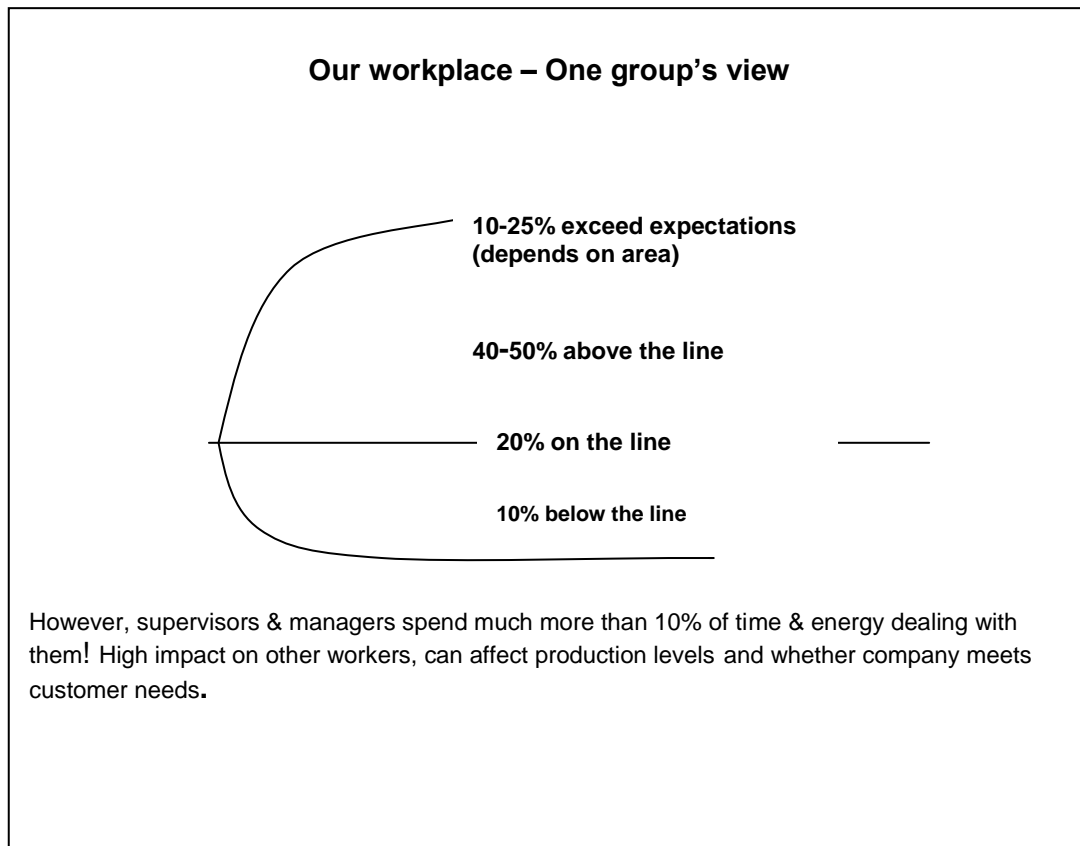
'Above the line/Below the line' model.

The model provided a way for supervisors to compare their perceptions of the characteristics of employees in each category, and estimate the percentage of employees in their own areas who were above, on, or below the line.

The model acted as a bridge between theory and practice. It provided a simple way for participants to:

- Discuss similarities and differences between different areas in the plant.
- Compare their ideas on what an above average, average and below average worker 'looks like' and discuss whether their expectations of people are reasonable.
- Identify where each individual supervisor might need specific skills to manage the people in their own area.
- Reinforce the message that absenteeism hurts everyone- major hassle for supervisor, senior management, other departments, customers and other employees. Can also put a dollar cost on it.
- Some areas employed highly skilled long term workers who were all above the line. Others had a concentration of below the line and were likely to be grappling with the impact of absenteeism, high number of unskilled casuals and a percentage of permanent workers with limited skills and motivation.

It also worked well for employees as a means of classifying leaders.



Leadership Group 1: Midfield Employee Profile

What people said

- Not everyone can be 'above the line'. A company needs a group of reliable, consistent workers who may not have the aptitude or the motivation to move up. They should be valued.
- A number of people 'on the line', or just above, do have potential to move up but need support.
- Below the liners
- Less than 10% of the company workforce was perceived to be operating 'below the line, ' but supervisors and managers spent more than 10% of their time dealing with the fall out.
- 'Below the liners' most likely to stay away without warning or genuine reasons.
- More likely to work 'half heartedly', to have a range of personal problems that impacted on work performance and /or to be involved in conflict.
- Some had stayed in boring undemanding jobs for some time because could not be trusted with greater responsibility, or showed little interest in learning more.
- A number of longer term casual staff in this pool.
- Not all 'below the liners' were incompetent no hoppers. Some had potential.
- Cost the company money. e.g.
- Lost 10% production on one day of preceding week. Cost \$40,000 because had to send half full trucks to Melbourne to meet export deadlines. Did not meet customer

requirements-only half the order sent which creates another set of problems for sales and marketing.

Model 2: 'Adopt a person'

Using the line model in Workshop 1 laid the foundations for the development of the 'Adopt a Person' approach. This entirely new idea based on participants' input captured people's attention in every workshop. It moved the emphasis away from general strategies to combat 'absenteeism' across the board, and towards practical, achievable outcomes.

Supervisors decided they could tackle absenteeism if they focused close to home. They could:

- Focus on one or two people in their own areas who were 'below the line' but who they felt had potential, or on the liners who could move up further (e.g. another classification level.)
- They could show an interest, listening, offering advice and opportunities for skills development etc see if s/he could find a way to assist them to move up.
- If each supervisor adopted *one* person, there was potential to make a difference to 25-30 people across the plant.
- Even if only 1/3 were successful, 10 people might start working harder, take an interest in learning more skills and/or stop taking days off. This would have a real (and possibly measurable) impact in time and cost savings and increased levels.

8.2 Appendix 2. Measuring company impact

Key questions asked as part of the Pilot provided a useful basis for identifying impact. These could also provide a useful foundation for the development of future monitoring programs within and across other companies.

1. Has the PD program influenced individual participants' behaviour?

Potential measures:

- Self –reporting at interviews.
- Self reporting against personal goals and action plan set during workshops
- Follow up interviews with supervisors to get feedback on employee participant behaviour and attitudes, and with participant employees to get feedback on supervisors' behaviour.
-

2. Has the new approach had any impact on areas identified as priorities e.g. conflict, absenteeism?

This involves establishing how the company currently addresses such issues and what documentation is kept and in what format. e.g.

Who is currently responsible for resolving conflict or for managing absenteeism?

At the pilot site, supervisors had the front line responsibility for the management of day to day issues that might interfere with productivity in their area. In the course of a day, they need to be alert for potential conflict situations and step in to manage arguments amongst employees. They may also have to manage poor performance. Supervisors were expected to deal with general workplace incidents where possible. If they could not resolve the issue, they called on a senior manager.

Although they were not formally responsible for the management of absentees and late comers, supervisors still had a role to play in the first instance, and may have an idea of what was actually happening. However, they were not usually involved in managing the problems and were initially uncomfortable at assuming any such role.

What documentation is available to provide a benchmark?

If conflict issues were escalate to management, follow-up might be handled informally, and not recorded at all. Documentation was only available for incidents judged serious.

Data on absenteeism was kept as part of payment records so was associated with individuals. It was not collated in terms of an area of the site, nor was it easily compiled to demonstrate patterns and trends over time.

Has the program had an impact on supervisors' confidence and skills to defuse situations before they are escalated to senior managers?

Possible measure:

The number of times and types of issues supervisors refer 'up the line' compared to the situation prior to the program. (This may entail a review of expectations of roles and responsibilities, and recording/reporting practices.)

3. Has the program made a difference to absenteeism rates?

A program such as this has the potential to influence absenteeism in several ways:

- Through a change in the quality of communication between supervisors/managers and employees (may build a better working climate generally and/or encourage more open discussion of issues that are of concern to the employee.)
- Through the impact of the 'Adopt a Person' program. (e.g. Over 50% of those adopted were considered to be 'at risk', with a history of absenteeism that could be charted before and after.)
- Through influencing the commitment and goals of individual employees who participated in the program. (if those involved were habitual absentees.)
- Through the influence exerted/example set by employees who have participated in the program. Employees who participated in the Pilot workshops discussed the potential to:
 - Give a helping hand to new people. Work more closely with others.
 - Take on an informal leadership role in their area.
 - Were generally keen to conduct an informal 'Adopt a person' approach themselves, and initial post workshop interviews showed that a number had put this into practice.

Possible measures:

- Overall absentee rates over time.
- Absentee rates for different areas over time.
- Individual attendance of adopted persons/workshop participants with a history of absenteeism.

5. Has the program influenced retention?

- Many factors influence why someone stays or leaves a company. However, the evaluation process identified the strong positive impact on employee participants.
- Several had been with the company for some years (e.g. 13 years) without promotion and had been feeling jaded.
- Several had been with the company since they were 15. Although still young and fairly immature they had developed a high level of skill as slaughtermen and felt they were owed a promotion after 6 or 7 years with the company. Prior to the workshops, one had been planning to leave. The workshop actually helped him temper his expectations and get a sense of the leadership skills he would need to develop to take on a

higher level role. Another felt he needed qualifications and was inspired to return to a TAFE course he had half finished. A third curbed his aggressive behaviour to such an extent that he was in fact promoted to leading hand six months after the workshop.

- Several younger employees with high potential felt that they were in a company that offered a real future.
- If this could have been harnessed it would have been a powerful jumping off point for something

6. How is the company faring generally?

If the workplace culture is changing because the company is investing time and resources in training and support programs, is this contributing to continuing improvement in company productivity?

It could be useful to keep a systematic eye on other productivity measures, particularly those that might be seen as general indicators of a productive workforce, such as numbers of accidents and Workcover premium rates.

These measures are influenced by many factors, so it will not be possible to make a direct cause-effect connection with a program, such as this but the bottom line is that these are bottom line figures! If they are improving, there may be a connection that can be tracked. These can also be benchmarked against meat companies that have no interpersonal skills programs.

8.3 Appendix 3. Selection of facilitators

Two important issues for the consideration of concern selection of facilitators for the proposed new industry program.

The pilot has shown that the ultimate success of these workshops depends largely on the expertise of the facilitator, who must have the ability to tailor the process to company and participant needs.

There is little room for mediocrity in this area. Meat processors have been very cautious about signing up for a program that focuses on aspects of workforce development that are so new to most in the industry. The Midfield experience has been so positive that it may overcome this caution, but even one mediocre workshop at another site could carry more weight than the positives – and spell the end of the program in the industry!

Anyone engaged as a facilitator must be an ‘expert’ who will have:

- A broad range and flexibility of behaviours so they can tailor each workshop to participant needs, make links within and across workshops, and interact effectively with people at every level of the organization.
- A heightened sensitivity to, and awareness of, the effects of their behaviours on an individual learner’s experience,
- The ability to organise material so that when it is expressed verbally it makes sense and is made relevant.

Previous meat industry experience, although useful, does not seem to be essential. The facilitator in this case established a sound working knowledge quickly and has since gone on to work extensively in the industry.